



# Your Family Story

## A Simple Approach to Meaningful Family Meetings

Building trust and sharing your family story and goals are essential elements to help ensure legacy plans are implemented successfully across generations.

Family meetings are structured discussions to foster open communication among family members, promote harmony, and help prevent conflicts that may undermine your family's long-term vision. Reflecting on where you've been and where you're headed can strengthen shared values and guide important decisions.



### It's Just a Conversation

Family meetings are about progress, not perfection. Whether you want to discuss your family's legacy, shared goals, or simply check in, these conversations are an opportunity to bring everyone together. They can foster connections, align intentions, and create an evolving roadmap for your family's future.

If the idea of a family meeting feels too heavy or complicated, remember: it's simply *a time to talk*. And often, these discussions will leave everyone feeling lighter and more connected. Over time, rather than something to avoid, family meetings can become a powerful way for you and your family to connect.



## A Simple List of Tips for Successful Family Meetings

### OBTAIN AGREEMENT

Determine the time and place for the family meeting. Provide plenty of notice and set the stage for all family members to participate.

### ESTABLISH THE PURPOSE AND GOAL

There are several types of family meetings to consider: wealth and values, the future of the family enterprise, inheritance of assets, and conflict resolution. Discuss one topic or solve one problem per family meeting and make decisions by consensus so the major needs and wants of all family members are considered.

### DESIGN COLLABORATIVELY

Determine who will speak at the family meeting. Presenters may include younger family members, an attorney or accountant, and an appointed fiduciary. Design the conversation and create an agenda to add structure to the discussion.



### COMMUNICATE EXPECTATIONS AND FORMAT

Consider whether the family meeting will be in person or virtual. Set the duration for the meeting as well as boundaries for communication. For example, encourage the use of “I...” as opposed to “you...” messages when sharing information to prevent listeners from feeling personally attacked.

### CREATE A SAFE AND COMFORTABLE ENVIRONMENT

The purpose of a family meeting is to encourage open communication among family members in a safe place. Create an environment where opinions can be expressed by all family members without punishment or retaliation. This allows effective communication, conflict management, and problem solving.

You don't have to navigate these conversations alone—HT|TC has spent decades helping families through life's most important and complex moments. Reach out today.

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